Ambetter Broker Portal

QUICK REFERENCE GUIDE

The next generation online experience is here to make your 2019 renewals and new sales a breeze!

Get powerful insights in a simple dashboard. Go deeper for all the detail you need. Filter, customize, export, and more. Your new Ambetter broker portal serves you better, so you can serve your clients better.

A new platform to serve you better in 2019

MORE VALUE FOR YOUR BUSINESS

You asked for more self-service sales tools, insight into member policies, and ways to better manage your Ambetter business. We reinvented our broker portal to take you there.

Live for 2019 open enrollment, the new portal puts all essential business-boosting tools at your fingertips.

This guide shows you all the great new features—plus quick tips and tricks to get you started!

**Click on the topic that interests you to view that section of the guide.
Or, read it all the way through.
Like the new portal, this guide works the way you want to use it!**

Get Started

Your new account is waiting for you. You just need to activate it.

Look for your account verification email from Ambetter. Follow the directions to activate your account.

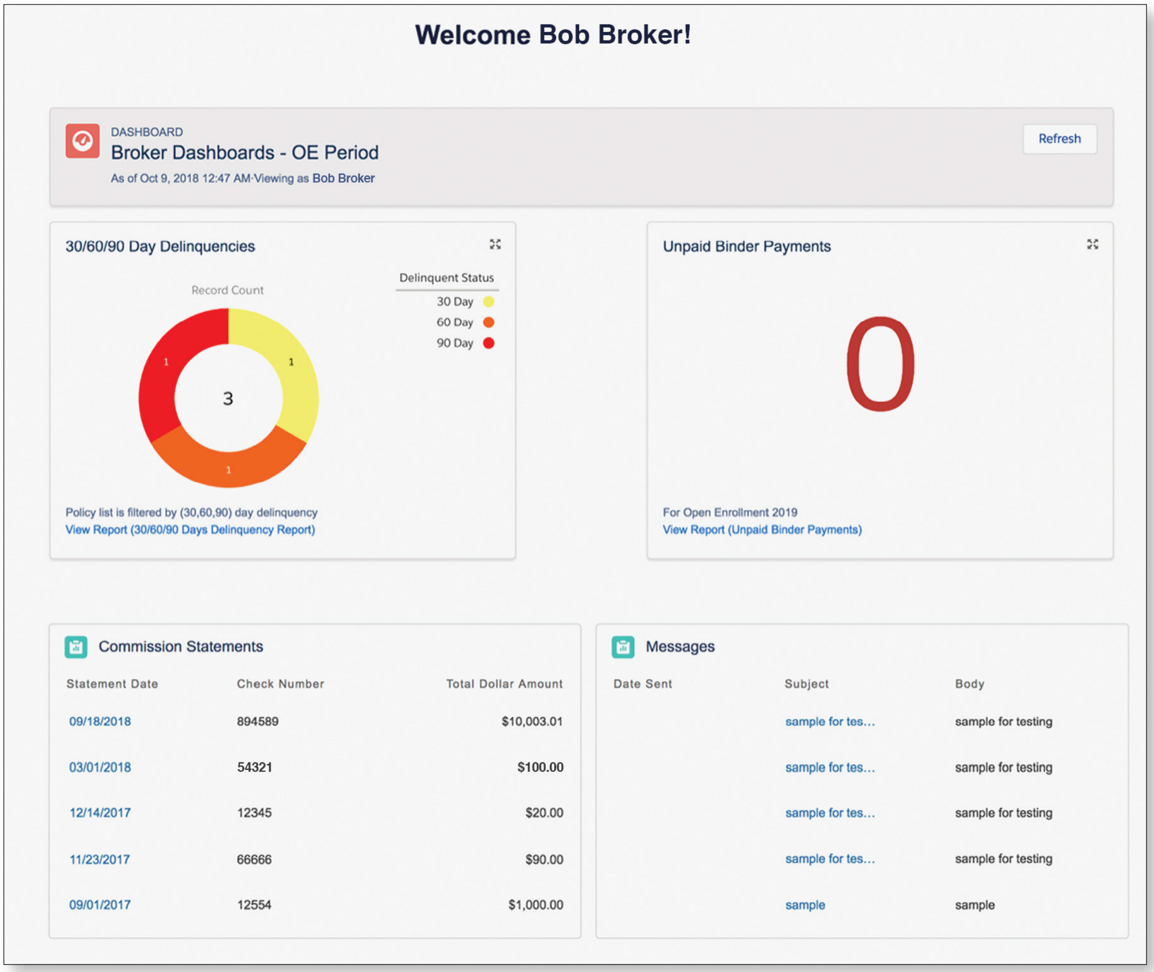
If you didn't get our email, check your spam folder. Still can't find it? We're standing by to help at ambetterbrokers@centene.com or 855-700-7985, option 2.

Contents

Your Dashboard

EVERYTHING YOU NEED AT YOUR FINGERTIPS!

When you log in to https://broker.ambetterhealth.com, you'll see a dashboard like this. It shows all the information brokers use most in a single screen—and lets you click deeper into the detail you need.



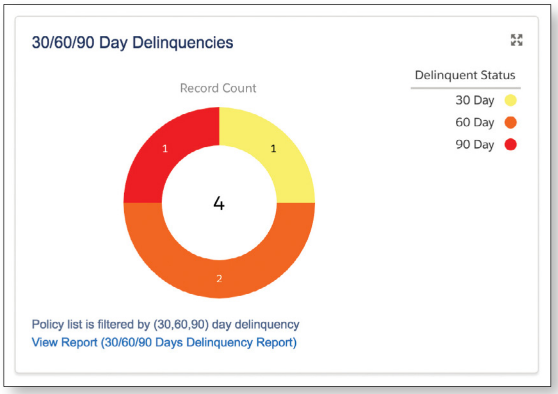
Read on

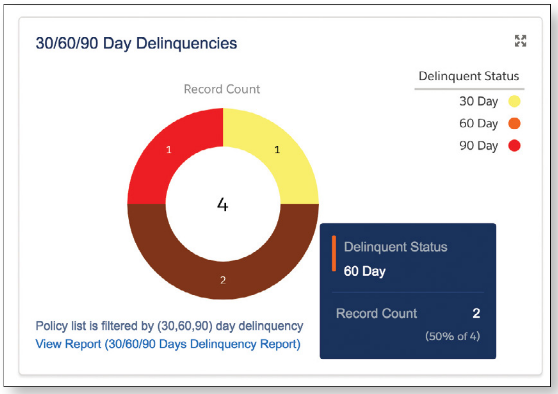
to learn more about the four dashboard sections: delinquencies, unpaid binder payments, commission statements, and messages.

Your Dashboard

30/60/90 Day Delinquencies

The delinquency status report makes it easy to see which policies must be paid so your clients can stay covered. The 30/60/90 Day Delinquency chart on your dashboard shows an overview of your Ambetter book of business.

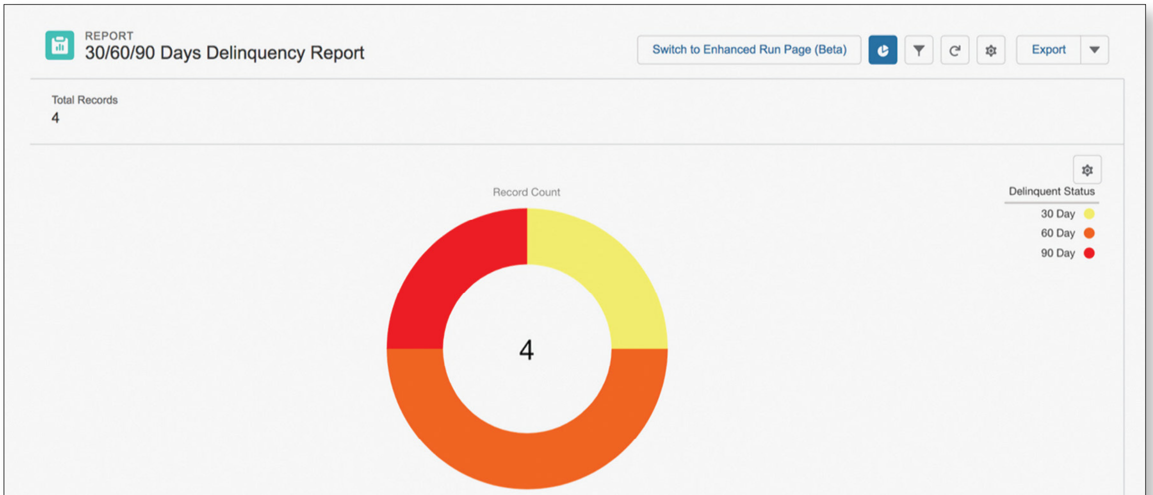




✔ Tip

Mousing over the chart gives you more detail, as in the example on the right.

Click on *View Report* or *Record Count* to see a comprehensive 30/60/90 Day Delinquency Report.



DELINQUENT STATUS	POLICY NUMBER	INSURED FIRST NAME	INSURED LAST NAME	PLAN NAME	POLICY PREMIUM	STATE	PAID THROUGH DATE
30 Day (1 record)	U01234567	-	-	-	-	-	7/18/2018
60 Day (2 records)	U01234567	-	-	-	$100.00	-	-
	U01234567	-	-	Product123	$5,000.00	-	6/1/2018
90 Day (1 record)	U01234567	-	-	-	-	-	12/26/2018
GRAND TOTAL (4 RECORDS)							

☑ Note

This example is for illustrative purposes. Your dashboard will show complete information for each policy.

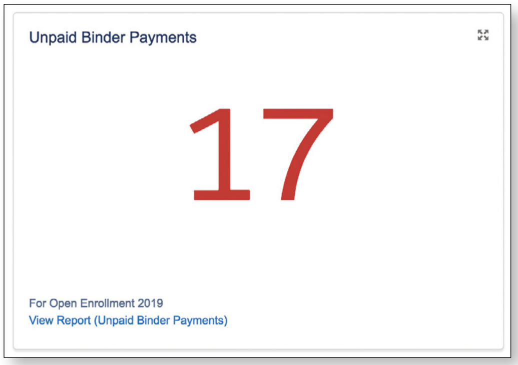
You can also customize the 30/60/90 Day Delinquency Report for the way you work:

- Create filters, sort, and set viewing preferences.
- Export data as a formatted report or details-only for calculations or uploading to other systems.

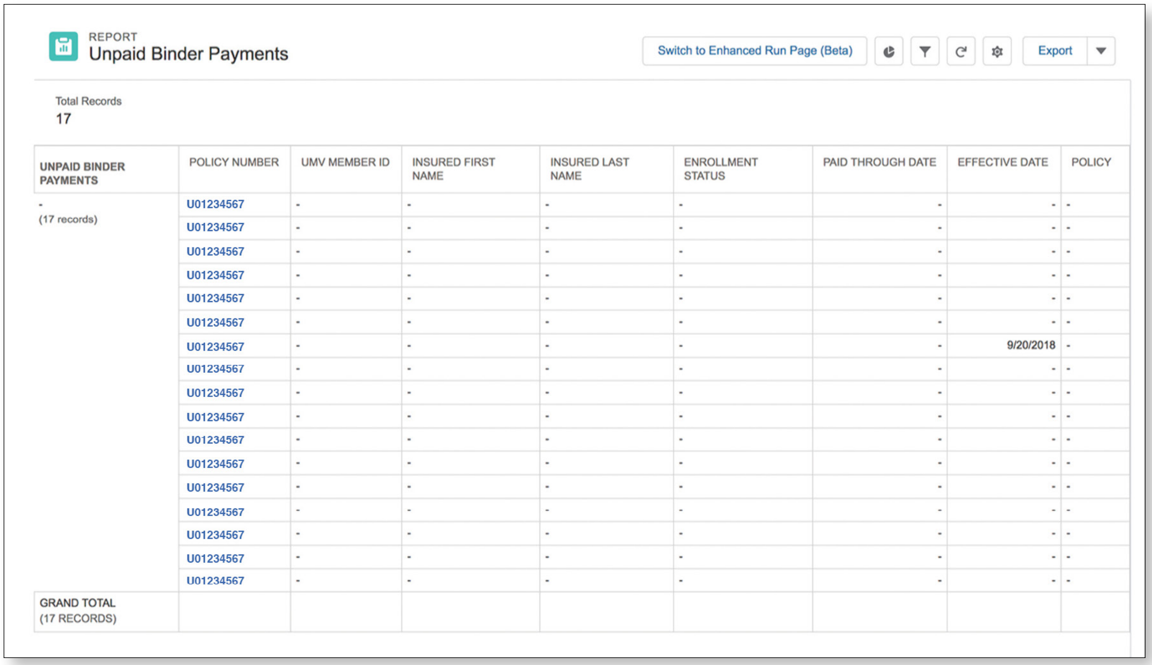
Your Dashboard

Unpaid Binder Payments

You'll see any clients who enrolled but haven't yet made their binder payment in this section of the dashboard. It's a great way to know who to follow up with about the initial premium payment—to help ensure all your clients have the health coverage they need.



Click *View Report* to see a list of all policies with unpaid binder payments.



Total Records
17

UNPAID BINDER PAYMENTS	POLICY NUMBER	UMV MEMBER ID	INSURED FIRST NAME	INSURED LAST NAME	ENROLLMENT STATUS	PAID THROUGH DATE	EFFECTIVE DATE	POLICY
- (17 records)	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	9/20/2018	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
	U01234567	-	-	-	-	-	-	-
GRAND TOTAL (17 RECORDS)								

Click on any policy number in the report to see comprehensive policy information for the client on the unpaid binder payment list.

You can also customize the Unpaid Binder Payments Report to the way you work:

- Create filters, sort, and set viewing preferences.
- Export data as a formatted report or details-only for calculations or uploading to other systems.

Note

This example is for illustrative purposes. Your dashboard will show complete information for each policy.

Your Dashboard

Commission Statements

Agency principals will see *Commission Statements* on their dashboard. This information is not available to agency sub-brokers.

If you are an agency principal, you'll have three view options:

View 1: Commission history overview

See your last five commission statements, right on the dashboard.

Commission Statements

Statement Date	Check Number	Total Dollar Amount
09/18/2018	894589	$10,003.01
03/01/2018	**54321**	**$100.00**
12/14/2017	12345	$20.00
11/23/2017	66666	$90.00
09/01/2017	12554	$1,000.00

View 2: Commission statement detail

Click any statement date from this list to see all the details about your agency's commissions during that month.

Commission Statement

Agency	Agency Commission	Check Date	Check Number	Check Amount	Statement Date
Bob Broker Agency	$45048.00	09/18/2018	12554	$1	09/01/2017

Export as PDF

Export as CSV

Show 10 entries

Agent Name	Agent Number	Insured Name	Policy Holder State	Policy Number	Policy Effective Date	No Of Members	Statement Date	Rate	Commission
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	2	02/28/2018	$6.00	$12.00
Bob Broker	12345678	Marv Member	FL	U01234567	01/01/2015	2	02/28/2018	$12.00	$24.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	1	02/28/2018	$6.00	$6.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	1	02/28/2018	$6.00	$6.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	1	02/28/2018	$6.00	$6.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	3	02/28/2018	$12.00	$36.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	2	02/28/2018	$6.00	$12.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2017	1	02/28/2018	$12.00	$12.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2015	1	02/28/2018	$6.00	$6.00
Bob Broker	12345678	Mary Member	FL	U01234567	01/01/2017	1	02/28/2018	$12.00	$12.00

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Continued on next page

Tip

Agency principals can access *Commission Statements* from the dashboard and the top and lower navigation of the Broker Portal.

Note

This example is for illustrative purposes. Your dashboard will show complete information for each policy.

Commission Statements, continued

View 3: Complete commission history

This view is available to agency principals from the top or lower navigation.

Producer Payments
All

New

7 items • Sorted by Check Number • Filtered by all producer payments • Updated a few seconds ago

Agency	Statement Date	Amount	Check Number	Check Type	Check Date	Month	
Ambetter Agency	3/1/2018			EFT	3/1/2018	03/2018	View Detail
Ambetter Agency	3/1/2018	$100.00	54321	Physical Check	3/1/2018	03/2018	View Detail
Ambetter Agency	12/14/2017	$20.00	12345	Physical Check	9/14/2017	12/2017	View Detail
Ambetter Agency	9/1/2017	$1,000.00	12554	Physical Check	9/18/2018	09/2017	View Detail
Ambetter Agency	11/23/2017	$90.00	66666	Physical Check	10/26/2017	11/2017	View Detail
Ambetter Agency	9/18/2018	$10,003.01	894589	Physical Check	9/18/2018	09/2018	View Detail
Ambetter Agency	8/15/2017	$50.00	999999	Physical Check	7/11/2017	08/2017	View Detail

You can also customize commission information for the way you work:

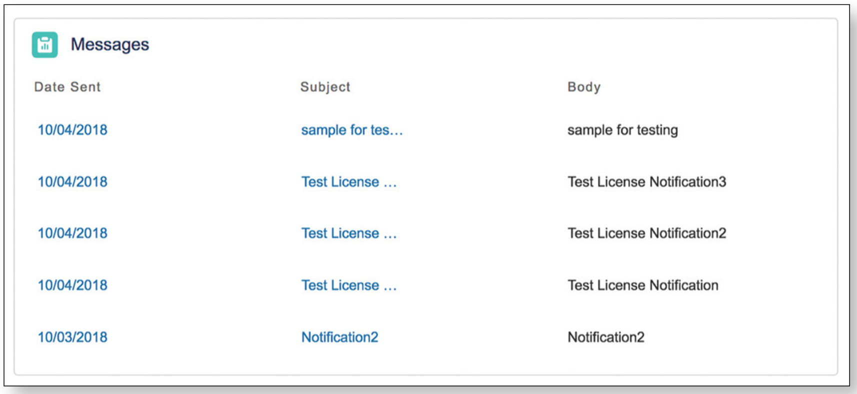
- Create filters, sort, and set viewing preferences.
- Export a PDF statement to conveniently view commissions in advance of mailed statements.
- Export data in an Excel document for calculations or uploading to other systems.

Choose from three commission statement views to get the insight you need.

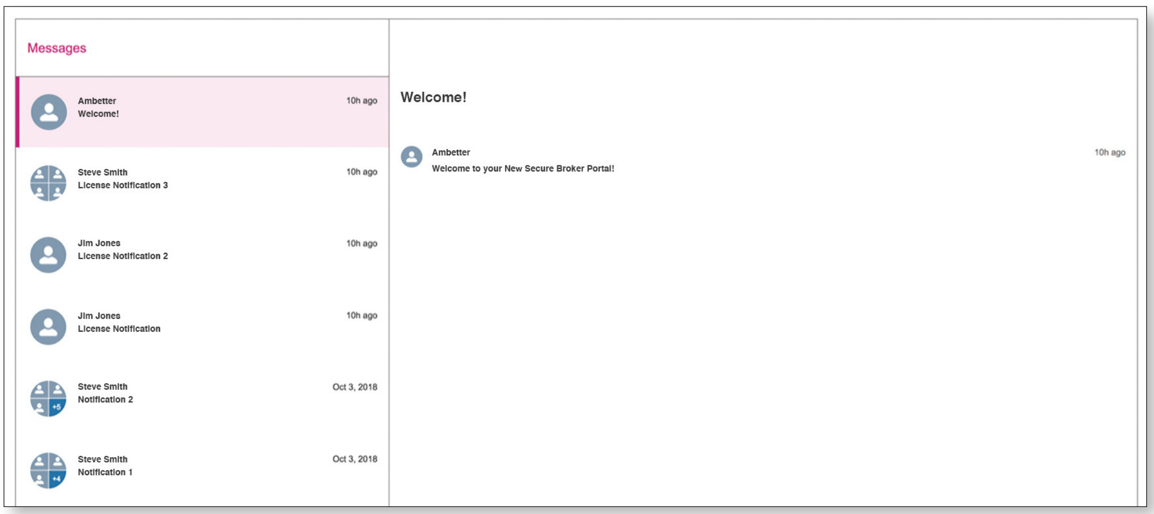
Your Dashboard

Messages

The Broker Portal Dashboard shows your most recent messages from Ambetter.



Click on any message to view it, along with your full message history.



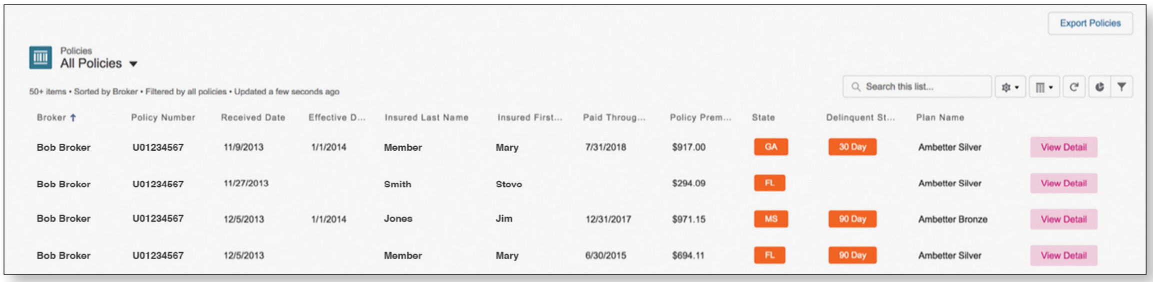
You can also view messages by clicking the bell icon next to your name in the top, right navigation bar.

Policies

SEE YOUR AMBETTER BOOK OF BUSINESS AT-A-GLANCE

Click on *Policies* in the top navigation or *View Policy Listing* in the lower navigation to see a complete list of your Ambetter clients.

- Agency principals will see policies written by every broker in the agency.
- Agency sub-brokers will see only their own clients' policies.

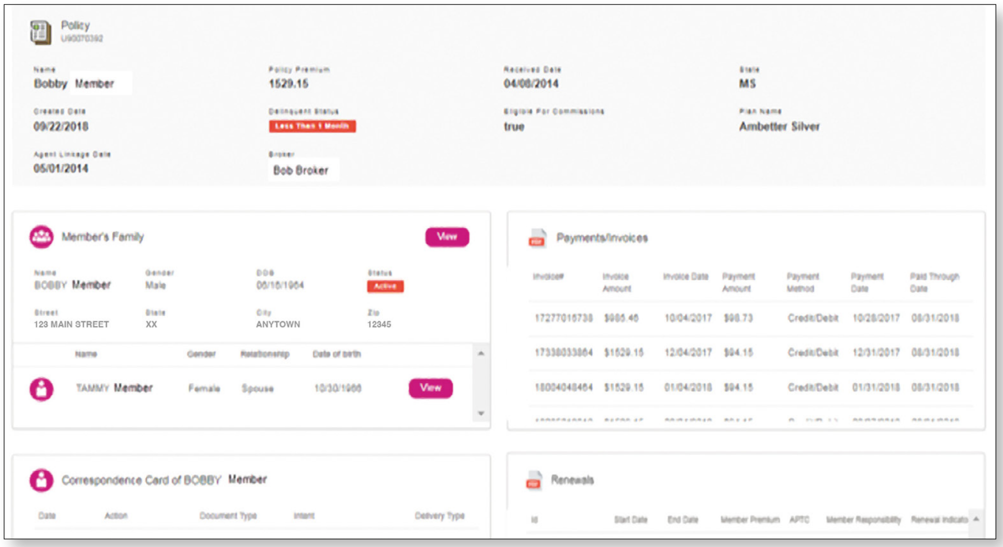


You can customize the All Policies Report:

- Create filters, sort, and set viewing preferences.
- Export data as a formatted report or details-only for calculations or uploading to other systems.

Click on the *View Detail* button to see in-depth information about that policy, including:

- Members' contact and personal information. Click on the *View* button next to each member to see the full correspondence history for that member.
- Payments & Invoices show detailed policy payment history.
- Correspondence history lists the materials (such as ID cards and welcome packets) sent to members, and when.
- Renewal insights and premium detail that highlight *paid* or *past due* status.

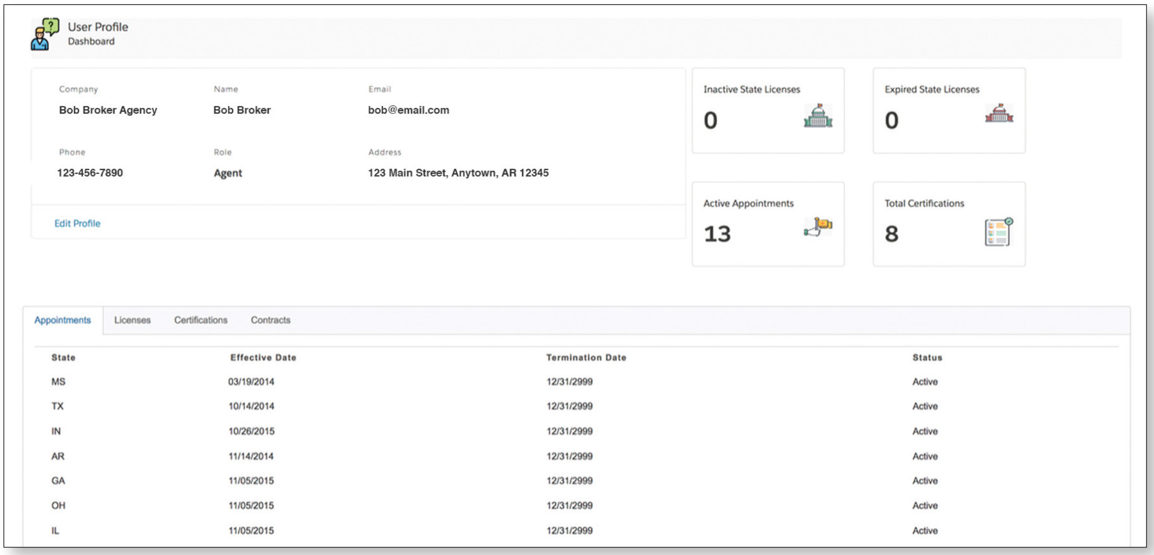


Your Profile

MANAGE YOUR ACCOUNT DETAILS ANY TIME

Your Profile page gives you both the big picture and full visibility into all of your Ambetter records.

It's easy to make changes to your personal information using the *Edit Profile* link. Soon, you'll also be able to update your licensing, appointments, and certifications!



Tip

Access your Profile from the navigation bar.

Click on the arrow next to your name.

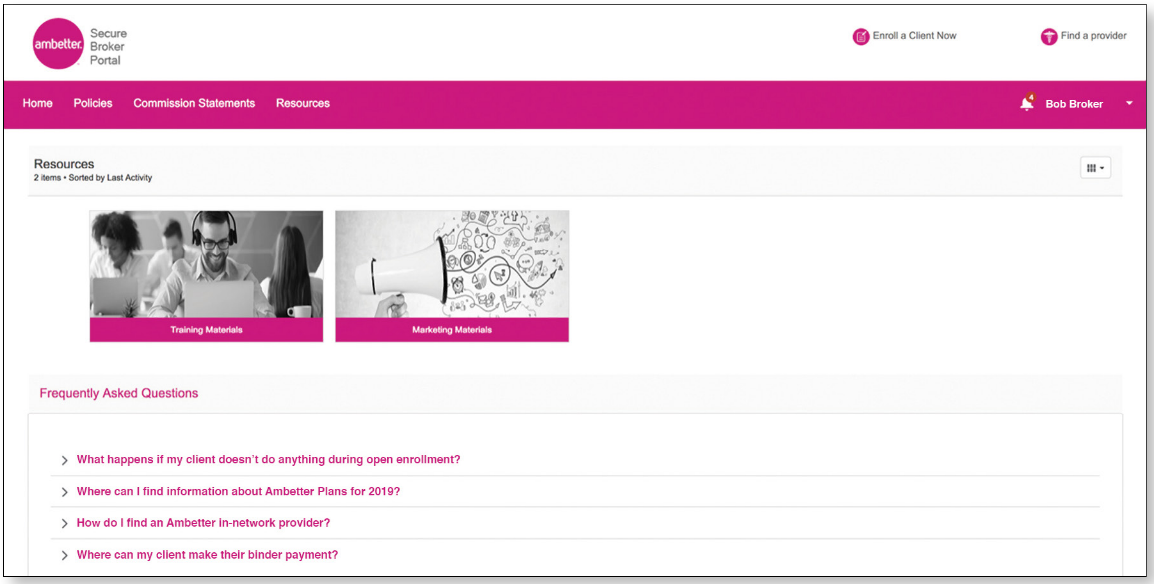
From the pull-down menu, click on *My Profile*.

Activate your new broker portal account to access all the tools that simplify your 2019 business.

Resources & More

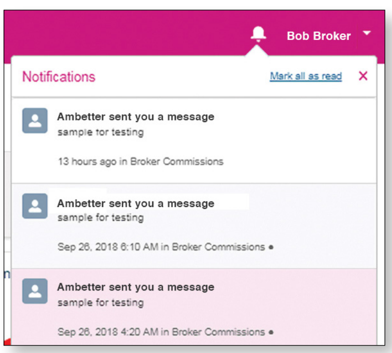
SUPPORTING YOUR SUCCESS WITH AMBETTER

When you need help, the Resources section (in the top and lower navigation) supports you with marketing and training materials. You'll also find answers to frequently asked questions.



Notifications

Click on the bell next to your name to view important messages from Ambetter. New messages will appear automatically in this bar.



Plus, you can connect to Ambetter tools that support your business above the top nav bar.

Enroll a Client Now

Takes you to our BrokerOffice site where you can enroll clients.

Find a Provider

See if your clients' providers are covered by the plans they're considering.

Ambetter Broker Portal

YOUR BOOK OF BUSINESS AT YOUR FINGERTIPS

The new broker portal lets you to manage your Ambetter book of business, your way. So, you can create more value for your clients and your business.

Ambetter for brokers — making your 2019 renewals and new sales simpler than ever before.

We're here for you

Need more help making the most of your broker portal?

- Call broker services at 855-700-7985, option 2
- Email us at ambetterbrokers@centene.com

We're standing by to help.